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GOVERNMENT OF INDIA
MINISTRY OF COMMERCE

REPORT OF THE
INDIAN TARIFF BOARD
ON THE
सत्यमेव जयते
WIRE HEALDS INDUSTRY

BOMBAY

1948

PRINTED IN INDIA FOR THE MANAGER OF PUBLICATIONS DELHI
BY THE MANAGER GOVERNMENT OF INDIA PRESS SIMLA 1948

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सत्यमेव जयते

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WIRE HEALDS INDUSTRY

1. The C. J. Textile Accessories Works, Bombay, in its letter No. 91|GOV|PERF|6352, dated 16th May 1946, applied to the then Department of Commerce, Government of India, for protection and general assistance to the wire healds industry. The case of the industry was referred to the Tariff Board by the then Department of Commerce, Government of India, in its Resolution No. 218-T(55)|45, dated 15th March 1947 read with paragraphs 2 and 7 of the Resolution No. 218-T(55)|45, dated 3rd November 1945 for investigating its claim for protection or assistance.

2. Under the Board's terms of reference which are stated in paragraph 5 of the resolution of 3rd November 1945, the Board has to inquire and report whether the industry satisfies the following conditions :—

Terms of reference.

- (1) that it is established and conducted on sound business lines ; and
- (2) (a) that, having regard to the natural or economic advantages enjoyed by the industry and its actual or probable costs, it is likely within a reasonable time to develop sufficiently to be able to carry on successfully without protection or State assistance ; or
- (b) that it is an industry to which it is desirable in the national interest to grant protection or assistance and that the probable cost of such protection or assistance to the community is not excessive. Where a claim to protection or assistance is found to be established i.e., if condition (1) and condition (2) (a) or (b) are satisfied, the Board will recommend—
 - (i) whether, at what rate and in respect of what articles, or class or description of articles a protective duty should be imposed ;
 - (ii) what additional or alternative measures should be taken to protect or assist the industry ; and
 - (iii) for what period, not exceeding three years, the tariff or other measures recommended should remain in force.

In making its recommendations, the Board has to give due weight to the interests of the consumer in the light of the prevailing conditions and also to consider how the recommendations affect industries using the article in respect of which protection is to be granted.

3. The Board issued a Press Communiqué on 17th March 1947 inviting all interests, connected with the industry, including producers, importers and consumers who desired their views to be considered by the Board, to submit their representations. Detailed questionnaires were issued in April 1947. Appendix I contains the list of Associations and persons to whom the questionnaires were issued and from whom replies or memoranda were received. It may be mentioned that the original applicant in this case, *viz.*, C. J. Textile Accessories Works at Vile Parle, Bombay, is the only known producer of wire healds in the country at present. Mr. R. Sundaram, the Cost Accounts Officer, with the help and advice of Mr. R. N. Kapur, Technical Adviser to the Board, investigated the cost of manufacture of wire healds at C. J. Textile Accessories Works. The Members of the Board, with its Secretary and its Technical Adviser visited the works on 14th January 1948. The President of the Board visited the factory on 23rd January 1948.

A public inquiry was held at Bombay on 18th February 1948. Appendix II contains the list of persons who were invited for giving evidence at the public inquiry and Appendix III gives the names of those who attended the inquiry.

4. Before the war, wire healds required for the textile industry were imported from abroad—mostly from Japan and the U.K. and to a small extent from Italy and Switzerland. By 1940 imports of wire healds from foreign countries were almost completely stopped and the scarcity of these mill-stores was actually felt by the textile industry. At this stage, C. J. Textile Accessories Works prepared a scheme for the production of wire healds and approached the Textile Directorate for assistance in securing the necessary raw materials. Government made the necessary arrangements to enable the firm to import steel wire from the U.K. with a high priority. Instructions were also issued to the Departments concerned for the release of other raw materials required for this industry. The firm was also given facilities for importing tools and machinery for the factory. It started production in 1941. However, owing to lack of technical personnel and up-to-date machinery, its production fell short of its rated capacity and its manufactures did not attain the requisite standard.

5. (a) *Types*.—There are several types of wire healds. The most common type is the 'Twisted eye' wire heald with round or oblong end loops. This type is mainly used for weaving cotton and silk cloth. Other ordinary types are 'Inserted eye' healds and 'Strip or Flat steel' healds. 'Inserted eye' healds are required for jacquard used with lingoes; 'Strip or Flat Steel' healds are chiefly required for linotype and very fine cloth weaving. Healds for woollen or jute fabrics or canvas are of thicker gauges of wire than those used in healds for cotton or silk goods. There are still other types of wire healds used for special purposes, such as, weaving of carpets, velvet, cocoas, ribbons and belts.

(b) *Sizes*.—The most common types of wire healds are those with the twisted centre eye, measuring $9\frac{1}{4}$ " or $10\frac{1}{4}$ " between the end loops and are

made from wire of 27 gauge. These loops, whether round or oblong, are 6 m.m. in size. Handlooms, specially in South India, however, require wire healds with 10 m.m. round loops. Longer healds, e.g., 11" or above, are in fact odd sizes and are hardly used for weaving cotton cloth in India. For fine cloth weaving 30 gauge wire healds are generally used. For silk weaving, 13" or 13.1|8" healds with oblong loops and made of 30 or 32 gauge wire are necessary. For jute, canvas and woollen weaving, healds 13" and above in length and of 20 to 24 swg. are used.

6. (a) Wire healds serve the same purpose as cotton healds. But in the case of cotton healds, there is a specific heald for each count of yarn to be woven. When a count of yarn is changed, the cotton heald must also be changed. In the case of wire healds, however, healds of one size can be used for a wide range of counts. This saves time and labour.

Comparison between wire healds and cotton healds.

(b) Before World War II, cotton healds were mostly used in the cotton textile industry, whereas wire healds were largely used in the handloom and the silk industries. It is estimated that about 75 per cent. of the cotton mills use cotton healds, and only about 25 per cent. wire healds. We understand that there is a general tendency now on the part of the cotton mills to change over to wire healds. Wire healds are initially more expensive than cotton healds, but wire healds last much longer than cotton healds and thus wire healds prove cheaper in the long run. A set of wire healds lasts for about 25 beams whereas a similar set of cotton healds lasts only for about 6 beams. Incidentally it may be mentioned that cotton healds are manufactured in a large quantity in India principally by three mills, namely, Mahendra Mills, Kalol, New India Industries, Baroda, and India United Mills, Bombay.

7. In the past, most of the wire healds were imported, as has been said before, from Japan and Great Britain. The machines required for the production of wire healds are automatic; in the pre-war years they were made solely by two manufacturers in Germany. E. Kirks & Co., Blackburn, Lancashire, and a few other manufacturers in the United Kingdom, have also been using German machines in the past. As the two factories manufacturing wire healds machinery in Germany were destroyed during the war, British manufacturers have now taken up the manufacture of similar machines. The demand for these machines being small, they are not produced on a mass scale. We were informed that some quotations for these machines were recently obtained from the U.S.A., by C. J. Textile Accessories Works. As healds are essential stores for cotton mills, it is desirable that their manufacture on up-to-date lines should be encouraged in the country. We, therefore, recommend that the manufacturers of wire-healds should be given every facility to import necessary machines from foreign countries, including the hard currency areas. If, however, they are not available from abroad, Government should explore the possibility of producing these machines in one of the ordnance factories in the country.

Machinery required for the industry.

8. There are various kinds of wire healds in use in the textile industry.

Scope of the inquiry. Our investigation, however, has been confined to wire healds of the most common type, viz., 'twisted eye' wire heads with round or oblong end loops, measuring $9\frac{1}{4}$ " or $10\frac{1}{4}$ " between the end loops and made from wire of 27 gauge. These loops, whether round or oblong, are 6 m.m. in size.

9. The two main items of raw materials required for the manufacture of wire healds are steel wire and tin. Other necessary materials are : hydrochloric acid, furnace oil, aviation spirit, zinc, card-board and packing paper. Of these, only steel wire of required gauge, tin and zinc have to be imported into the country from abroad. Other materials are locally available. The Indian Steel & Wire Products Ltd., in its letter No. 3325/47/1/Genl., dated 5th August 1947 has informed the Board that it has already placed orders for suitable machinery which can draw 28 and 32 gauge wires. This firm expects to receive the machinery by the middle of 1948, soon after which it will produce wires of the required gauges.

10. The successive steps in the process of manufacture of wire healds are as under :—

- (i) Two wires of required gauge, after they have been cleaned by passing through a hot tube and an acid bath, are tinned together in a tinning furnace to form a double wire.
- (ii) The double wire is then mechanically cut into pieces of required lengths.
- (iii) These pieces are fed into automatic machines called 'twisters' where the two ends of each piece are automatically bent over and twisted to form a loop at either end. The centre of the piece is pierced and similarly twisted to form a small 'eye'.
- (iv) The healds made on the twisters are removed to a soldering machine where the twisted portions of the heald are soldered to form a smooth and strong joint.
- (v) Finally, the wire healds are carefully inspected and then threaded together to form bundles of 1,000 pieces each.

11. Wire healds are used for dividing the warp into two portions for inserting the weft. They are mounted on a frame which is placed immediately in front of the warp before it passes through the reeds.

12. The annual demand for wire healds in India as given by C. J. Textile Accessories works is 55,000 bundles of 1,000 pieces each. This firm expects the future demand of wire healds to be about three times that figure whereas the Star Trading Co., Bombay, estimate the demand at 100,000 bundles per year. The Ministry of Industry and Supply, however, estimate the future consumption at 70,000 bundles of 1,000 pieces each. At the public inquiry it was agreed that at least 80,000 bundles would be required by the cotton

textile industry. During the inquiry, it was disclosed that there was a growing tendency on the part of the cotton mills to switch over from cotton healds to wire healds when wire healds of proper quality are available. It was, therefore, agreed at the public inquiry that the demand might be taken at 80,000 bundles per annum in the next three years.

13. Wire healds are not shown separately in the annual Statement of the Sea-Borne Trade of India. They are included under "Textile Machinery, other stores". The Ministry of Industry and Supply estimate that about 55,000 bundles of wire healds used to be imported annually before the war. The Textile Commissioner has given the following figures of imports of wire healds from 1942 to 1945 :—

	Bundles.							
1942	48,162
1943	43,936
1944	52,913
First 9 months of 1945	73,083

Mr. Stott, a representative of Yones Textilaties Export Co., Ltd., stated at the public inquiry that during 1947 his firm alone imported 4,900 bundles which, he pointed out, covered only 10 per cent. of the enquiries received by them. This would show that there is a large unsatisfied demand for imported wire healds and only a part of it is met by imports. It is, however not possible to forecast with any accuracy the volume of imports of wire healds that may be expected to come into the country during the next two or three years. But, in view of the fact that, under the present import control, licences are to be freely issued for importing this article from both dollar and non-dollar areas, its imports will probably go up in volume.

14. As has already been stated, C. J. Textile Accessories Works, Bombay, is the only known factory producing wire healds in the country. Its annual production figures are as follows :—

Year.	Bundles of 1,000 pieces each.							
1941	600
1942	335
1943	2,665
1944	3,812
1945	6,700
1946	5,964
1947	6,819

This Company has 10 automatic twisters and the present maximum capacity of each twister as determined by the Board's Technical Adviser is 32 healds per minute. On this basis, production per machine per day of 8 hours will be 15,360 healds. For 10 such machines working 8 hours per

uay, the annual production, on the basis of 300 working days, will work out to 46,080,000 healds or 46,080 bundles of 1,000 healds each. But as the machines are old and the parts are not standardized and interchangeable, we have to make allowance for breakdowns. We have, therefore, allowed 30 per cent. for interruption due to breakdown. We have also assumed that only 8 machines on an average will work throughout the year. On this basis, the production can be assumed to be 25,805,000 pieces or 25,805 bundles of healds in 1948. As the firm has ample stocks of wire, and other raw materials at present, it should be able to attain the above production. The firm does not expect to obtain any new machinery in 1949 but proposes to run the factory on two shifts. Allowing for reduction in output by 25 per cent. in the second shift as compared with that of the first shift, the expected output in 1949 and 1950 will be 45,158 bundles of wire healds per year. It will be noted, however, that even if the firm attains this production in 1949 and 1950, its output will still fall short of the country's estimated demand of 80,000 bundles a year.

15. The question of quality of the indigenous product was discussed at length by the Board with the representatives of producers, importers and consumers. It was contended that the indigenous wire healds did not compare favourably with the imported article. It was stated that the workmanship was inferior and that the gauge of wire used was of uneven thickness and wanting in tested quality. The soldering and the finish were also stated to be far from satisfactory, the eyes in the centre of the wire healds and the loops at both ends being defective. Further, it was reported that the indigenous product got easily split at the twisted eye. It was said that the packing was also not satisfactory inasmuch as the eyes did not run at a fixed uniform angle ; this caused considerable difficulty for the consumer while setting the healds on the loom. Moreover, the healds were not properly marked to facilitate their use on the looms ; this led to an uneven assembling of the healds in the frame. Nevertheless, the consensus of opinion seemed to be that the indigenous article had shown steady improvement in quality during the last few years. The manufacturers also assured the Board that they were endeavouring to rectify the present defects and expected to put into the market next year wire healds which would be as good as the imported article. We have reason to believe that most of the existing defects in the indigenous healds are mainly due to the use of old machinery and lack of suitable technical guidance at the factory. We have already recommended that facilities should be given to manufacturers of wire healds to import up-to-date machinery ; we also recommend that they should be assisted in obtaining the required technical personnel from abroad.

16. (a) As stated earlier, the cost of production of wire healds manufactured by C. J. Textile Accessories was investigated by the Cost Accounts Officer attached to the Board. The firm is a private registered partnership with three equal partners and it came into existence in 1940 for the manufacture of wire healds, reeds and other allied textile accessories. The accounts of this firm are maintained in Gujarati and are closed each year on the Diwali Day. No auditors are

Board's estimate of cost of production and fair selling price.

employed to certify the accounts ; nor is there a costing system in use. Production records, as maintained, are very inadequate, while no store records, giving details of items and quantities of stores purchased and issued are kept. There are also no records to show the quantities produced. In the circumstances, the Board built up its estimate of cost of production of wire healds on such data as were available with the help of explanations given by the management.

(b) The costing relates to the first half-year ended 30th June 1947. The firm manufactures wire healds of two sizes, *viz.*, 9½ inches and 10¼ inches. The cost of production of 9½ inch healds has been worked out in detail, while that of 10¼ inch healds has been found out by adding, to the cost of 9½ inch healds, only the cost of additional materials required for that size.

(c) The firm is almost exclusively engaged in the manufacture of wire healds and reeds. All direct expenses have been allocated as far as practicable to each department while the overheads have been distributed in the ratio of direct wages of each department. On this basis, the percentage of expenditure relating to Healds Department comes to 49 per cent.

(d) In estimating the cost of production in 1948 and in 1949-50, certain adjustments have been made ; (i) cost of steel wire has been taken at Rs. 1-4-4 per lb., as against Re. 0-15-5 in 1947 on account of increase in the price ; (ii) wastage on raw materials has been allowed at 10 per cent. ; (iii) an increase of 10 per cent. in wages has been provided for ; (iv) in spite of the expected increase in production, the establishment charges have been kept at the 1947 level ; (v) on the basis of bonus payments made in the past, bonus to workers and staff (excluding the partners) has been allowed at 8 per cent. of the total wages and salaries bill ; (vi) an increase of 10 per cent. in all other overheads has been provided for to cover the cost of additional output ; (vii) a total allowance of Re. 1,500 per month for the two partners has been provided for as their reasonable remuneration for looking after the day-to-day affairs of the firm, and of this, 49 per cent. has been allocated to wire healds.

(e) Depreciation has been allowed at income tax rates on the written-down value of the block.

(f) The working capital has been taken at 3 months' cost of production and interest thereon has been allowed at 4 per cent. per annum.

(g) The block capital relating to the wire healds department has been taken at Rs. 65,105 and the return thereon at 10 per cent. per annum has been allowed.

(h) The Board's estimate of the cost of production and fair selling price of wire healds in 1947, 1948 and in 1949-1950 is as follows :

WIRE HEALDS INDUSTRY

C. J. Textile Accessories Works, Vile Parle

Cost of Production and Fair Selling Price per bundle of 1000 Wire healds

27G 9½" during the half year ended 30th June 1947.

Total Production = 3,600 Bundles of 1,000 each = 3,600,000 nos.

Details.					Rate per lb.	Quantity.	Amount.
					Rs. A. P.	Lbs.	Rs. A. P.
1. Raw Materials.							
Steel wire 28 SWG.	..	..	..	..	0 15 5	1-25	1 3 3
Tin .. .. .	..	..	..	..	2' 13 3	1-13	3 3 2
Hydrochloric acid	..	..	..	..	0 3 0	0-32	0 1 0
Zinc .. .. .	..	..	..	..	0 4 9	0-09	0 0 5
Total Material Cost					..	..	4 7 10
2. Power & Fuel.							
(a) Electricity	..	..	..	..	..	..	0 2 4
(b) Coal .. ..	..	..	..	..	..	..	0 0 6
(c) Aviation Spirit	..	..	..	..	..	..	0 1 11
(d) Furnace oil	..	..	..	..	..	..	0 0 9
3. Labour .. ..	..	..	..	..	..	..	1 12 2
4. Repairs & Maintenance	..	..	..	..	..	..	0 7 0
5. Consumable Stores	..	..	..	..	..	..	0 7 2
6. Establishment.							
(a) Salaries of officers	..	..	..	..	..	..	0 5 3
(b) Other Establishment	..	..	..	..	..	..	0 15 8
7. Depreciation ..	..	..	..	..	..	..	0 8 9
8. Other overheads	..	..	..	..	..	..	0 10 0
9. Packing charges	..	..	..	..	..	..	0 3 6
10. Selling expenses	..	..	..	..	..	..	..
11. Interest on Working Capital	..	..	..	..	..	..	0 1 8
12. Total Cost of Production	..	..	..	..	..	..	10 4 6
13. Return on Fixed Capital	..	..	..	..	..	..	1 12 11
14. Fair Selling Price	..	..	..	..	..	..	12 1 5
Fair Selling Price of Wire healds 27G—10½"					..	..	12 3 9

Estimated cost of production and fair selling price per bundle of 1000 wire healds, 27G-9½" for the year 1948

(Expected total production 25,805 bundles = 25,805,000 pieces)

Details.					Rate per unit.	Quantity.	Value.
					Rs. A. P.	Lbs.	Rs. A. P.
1. Raw Materials.							
Steel Wire 28 SWG.	..	..	..	..	1 4 4	1-22	1 8 10
Tin ..	..	..	..	..	2 13 3	1-10	3 1 9
Hydrochloric acid	..	..	..	..	0 3 0	0-32	0 1 0
Zinc ..	..	..	..	..	0 4 9	0-09	0 0 5
Total cost of materials					..	..	4 12 0
2. Power & Fuel.							
Electricity ..	..	..	..	..	..	..	0 0 10
Coal ..	..	..	..	..	..	..	0 0 2
Aviation Spirit	..	..	..	..	..	..	0 0 9
Furnace Oil ..	..	..	..	..	..	..	0 0 4
3. Labour ..	..	..	..	..	..	..	0 8 8
4. Repairs & Maintenance ..	..	..	..	..	..	..	0 2 2
5. Consumable stores ..	..	..	..	..	..	..	0 2 2
6. Establishment.							
(a) Salaries of officers ..	..	..	..	..	..	..	0 6 11
(b) Other Establishment ..	..	..	..	..	..	..	0 4 5
7. Depreciation ..	..	..	..	..	..	..	0 2 4
8. Other Overheads ..	..	..	..	..	..	..	0 4 4
9. Packing charges ..	..	..	..	..	..	..	0 3 4
10. Selling Expenses ..	..	..	..	..	..	..	..
11. Interest on Working Capital ..	..	..	..	..	..	..	0 1 1
12. Total cost of production ..	..	..	..	..	..	..	7 1 6
13. Return on fixed capital ..	..	..	..	..	..	..	0 4 2
14. Fair Selling Price ..	..	..	..	..	..	..	7 5 8
Fair Selling Price of wire healds 27G—10½"					..	..	7 8 7

Estimated cost of production and fair selling price per bundle of 1,000 wire healds, 27G-9½" for the year 1949-1950

(Expected total production 45,158 bundles = 45,158,000 pieces)

Details.					Rate per unit.	Quantity.	Value.
					Rs. A. P.	Lbs.	Rs. A. P.
1. Raw Materials.							
Steel Wire 28 SWG	..	..	..	..	1 4 4	1.17	1 7 9
Tin	..	..	..	..	2 13 3	1.05	2 15 6
Hydrochloric Acid	..	..	..	..	0 3 0	0.29	0 0 10
Zinc	..	..	..	..	0 4 9	0.08	0 0 5
Total cost of Materials					..	..	4 8 6
2. Power and Fuel.							
Electricity	..	..	..	..	..	..	0 1 0
Coal	..	..	..	..	..	..	0 0 3
Aviation Spirit	..	..	..	..	..	..	0 0 10
Furnace Oil	..	..	..	..	..	..	0 0 4
3. Labour	..	..	..	..	..	..	0 9 11
4. Repairs & Maintenance	..	..	..	..	..	..	0 1 10
5. Consumable Stores	..	..	..	..	..	..	0 2 3
6. Establishment.							
(a) Salaries of Officers	..	..	..	..	..	..	0 3 11
(b) Other Establishment	..	..	..	..	..	..	0 2 6
7. Depreciation	..	..	..	..	..	..	0 1 8
8. Other Overheads	..	..	..	..	..	..	0 2 11
9. Packing charges	..	..	..	..	..	..	0 3 4
10. Selling expenses	..	..	..	..	..	..	0 0 9
11. Interest on working Capital	..	..	..	..	..	..	0 1 0
12. Total cost of production	..	..	..	..	..	..	6 9 0
13. Return on fixed capital	..	..	..	..	..	..	0 2 5
14. Fair selling price	..	..	..	..	..	..	6 11 5
Fair selling price of wire healds 27G-10½"	..	..	..	..	..	..	6 14 1

17. (1) Important raw materials, such as, steel wire and tin are imported. Tin is the biggest item in the cost of production at C. J. Textile Accessories Works due to their using a tinning furnace which necessarily results in rather heavy oxidation and consequent loss of tin. We were told that consumption of tin in this factory could be reduced by providing controlled atmosphere in the tinning bath.

(2) Labour cost is high due to labour being less efficient mechanically than in foreign countries. The machinery at C. J. Works, however, is both old and out-of-date and requires frequent repairs as well as overhauls. This naturally interrupts its production. As the parts of the existing machines are non-standardized and therefore non-interchangeable, each machine-part, big or small, requires individual attention in the maintenance. The management of C. J. Works, however, is trying to standardize the parts of the twistors. Attempts are also being made to effect certain modification in the existing plant, and some progress has already been made in these directions.

(3) Overheads are high on account of low production and should become lower as production expands.

18. 'Wire healds' are not specified separately in the First Schedule to the Indian Tariff Act, XXXII of 1934, as in operation on 1st January 1948. 'Healds, heald cords, and heald knitting needles are grouped together under item 72(1). The relevant extract from the Indian Customs Tariff, 28th issue, is given below :—

Item No.	Name of Article.	Nature of duty.	Standard	Preferential rate if the article is the produce or manufacture of.		
				The U. K.	A British Colony.	Burma.
72(1)	The following Textile Machinery and apparatus by whatever power operated, namely healds, heald cords and heald knitting needles.	Revenue	10 per cent. <i>Ad Valorem.</i>		..	Free.

- 19. The following statement gives the latest available figures of landed cost, with its break-up into c.i.f. price, import duty, landing and clearing charges, of wire healds 9½ inch long 27 SWG per 1,000 pieces.

C.i.f. price and landed cost.

C. I. F. PRICES AND LANDED COSTS
Wire Healds (1,000 pieces) 9½" Long 27SWG

Serial No.	Source of information.	Country of origin.	Period.	Landed Cost.			
				C. I. F. Price.	Import duty 10%.	Landing & Clearing charges.	Total landed cost.
1	2	3	4	5	6	7	8
1	Collector of Customs, Bombay	U. K. ..	January 1948	9 5 4	0 14 11	0 2 3 (1½%)	10 6 6
2	Collector of Customs, Bombay	Italy ..	January 1948	9 9 9	0 15 5	0 2 4 "	10 11 6
3	Collector of Customs, Madras	U. K. ..	December 1947.	7 10 10	0 12 3	0, 1 10 "	8 8 11
4	Volkart Brothers, Bombay ..	U. K. ..	March 1947	7 0 3	0 11 2	0 0 7 "	7 12 0
*5	Swastik Textile Traders Co. Ltd., Ahmedabad	Italy ..	April 1947	10 0 3	1 0 0	0 2 5 "	11 2 8
6	Mahta Parikh and Co., Bombay	U. K. ..	August 1947	7 6 9	0 12 0	0 1 3 (1%)	8 4 0 to 8 6 0
7	British Mill Stores Co., Bombay	U. K. ..	September 1947.	8 3 0	0 13 0	0 3 0 (2½%)	9 3 0
8	Textile Traders, Bombay ..	U. K. ..	October 1947	7 6 0	0 12 0	0 1 9 (1½%)	8 3 9
9	Dadiba Ardealir & Co., Bombay	U. K. ..	November 1947.	8 8 6	0 13 8	0 3 5 (2½%)	9 9 7

* 9½" to 13½" G 27 mm to 32 mm.

20. Comparative statement of fair selling prices of Indian wire healds and lowest landed cost of imports (9½" × 27 SWG) per 1,000 pieces :—

	Rs. A. P.				Rs. A. P.			
(a) Fair selling price	7	5	8	(1948)	6	11	5	(1949 & 1950)
(b) C.i.f. price	7	0	3		7	0	3	
(c) Duty at 10 per cent.	0	11	2		0	11	2	
(d) Landing and clearing charges	0	0	7		0	0	7	
(e) Landed cost without duty	7	0	10		7	0	10	
(f) Landed cost with duty	7	12	0		7	12	0	
(g) Difference between fair selling price and landed cost without duty, i.e. (a—e)	0	4	10		0	4	10	
(A) The above difference as percentage of c.i.f. price	4.3%				4.8%			

From the figures given above it will be seen that the duty required to cover the difference between the fair selling price of the indigenous wire healds in 1948 and the landed cost of import without duty is 4.3 per cent. The present revenue duty of 10 per cent. *ad valorem* will continue at least up to 31st March 1949. This will amply cover the difference between the two prices. In 1949 and 1950, the fair selling price of the indigenous wire healds will be less than the present figures of the lowest landed cost of imports without duty and the industry should be able to face foreign competition even without the aid of the present revenue duty of 10 per cent. We, however, believe that the present revenue duty of 10 per cent. *ad valorem* will continue to be levied for at least 2 or 3 years more and this will serve as a cushion for the indigenous article to withstand the pressure in the event of a moderate fall in the c.i.f. prices in the near future. In the circumstances, we think that there is no need to grant protection to the industry.

21. (1) In comparing the fair selling price with the landed cost of imports, we have taken the c.i.f. prices prevalent in the year 1947 and the early part of 1948. There was, however, a case where one lot of wire healds was imported in Calcutta in January 1948, from the United Kingdom at a duty-paid landed cost of Rs. 6-2-2. But this was found to be an isolated case and we do not consider it proper to base our conclusions on it. This is further supported by the fact that the manufacturers of wire healds have found no difficulty up to the present in disposing of their products in competition with the imported commodities.

(2) Our attention was also drawn to the possibility of Japanese wire healds being imported into the country at prices much lower than the present prices of imports. In this connection certain quotations were produced before us to show that an offer had actually been made by a

Japanese firm to supply wire healds at the rate of about Rs. 4-10-8 per bundle of thousand pieces. But no firm contract had so far been made with the Japanese exporters concerned and no Japanese wire healds had actually been imported at that price. Although we consider that there is a potential danger of Japanese wire healds entering the country at very low prices, we cannot say whether such a danger will actually arise in the near future. Such being the case, we cannot take this factor into consideration in determining the measure of protection, if any, to be granted to the indigenous industry. At the same time, we consider that the situation should be carefully watched. Should Japanese wire healds begin to enter this country in sizeable quantities and at prices so low as would prejudice the position of the indigenous manufacturers in our home market, the manufacturers may apply to Government to reconsider the case and, if necessary, to order a summary inquiry.

22. Our conclusions and recommendations are summed up as summary of conclusions under :—
and recommendations.

- (i) The two important items of raw materials required for the industry, viz., steel wires of 28 and 32 gauges and tin, are at present imported from abroad. Steel wires of the requisite gauges are, however, likely to be produced in the country by the end of 1948. (Paragraph No. 9)
- (ii) The estimated annual demand of wire healds in India during the next three years is 80,000 bundles of 1,000 pieces each. (Paragraph No. 12).
- (iii) The maximum production so far achieved was only 6,819 bundles in 1947. The estimated production for 1948 and 1949 is 25,805 and 45,158 bundles respectively. (Paragraph No. 14).
- (iv) The quality of the indigenous product has improved in recent years, but there is still room for further improvement. We recommend that facilities should be given to the manufacturers of wire healds to import up-to-date machinery and get technical personnel from abroad. (Paragraph No. 15).
- (v) The Board's estimate of fair selling price of 1,000 wire healds, 27 SWG—9½", is Rs. 7-5-8 for 1948 and Rs. 6-11-5 for 1949 and 1950. (Paragraph No. 16).
- (vi) A comparison of the estimated fair selling price of the indigenous articles with the landed cost over imports without duty shows that the industry needs no protection at present. (Paragraph No. 20).
- (vii) The industry is apprehensive of serious competition from imports of low priced wire healds in future. Should such competition arise and jeopardise the position of the industry, it may approach Government for ordering a summary inquiry. (Paragraph No. 21).

23. The Board wishes to express its thanks to Mr. J. Singh, Deputy
Acknowledgments. Director General, in the Ministry of Industry
 and Supply, Mr. D. E. Cooper, Additional Director in the Office of the
 Textile Commissioner, for their valuable assistance and to Mr. M. Ahmad-
 ullah, Secretary, Dr. Rama Varma, Assistant Secretary, Mr. R. N. Kapur,
 Board's Technical Adviser, Mr. R. Sundaram, Cost Accounts Officer, and
 the Board's Office for their work at all stages of the inquiry.

G. L. MEHTA

.....PRESIDENT

H. L. DEY

.....MEMBER

B. V. NARAYANASWAMY NAIDU

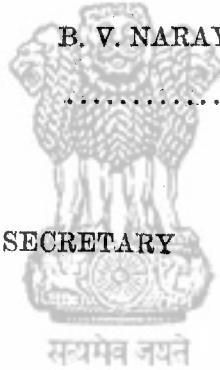
.....MEMBER

M. AHMADULLAH

.....SECRETARY

Bombay,

Dated the 9th April 1948.



APPENDIX I.

(Vide Para 3).

List of Associations and Persons to whom the questionnaires were issued and from whom replies or Memoranda were received.

In addition to all the Directors of Industries with the Provincial Governments and Chambers of Commerce and Associations, relevant questionnaires were sent to the following producers, importers and consumers of wire healds.

*Denotes those who have answered the questionnaire.

†Denotes those who are not interested.

PRODUCERS :

- *1. C. J. Textile Accessories Works, Nehru Road, Vile Parle, Bombay 24.

IMPORTERS :

1. Abdus Samad Abdul Huq, Butcher Mahal, Allahabad.
2. Associated Textile Engineers, 43, Forbes Street, Fort, Bombay.
3. Burma Oil Co. (India Trading) Ltd., Post Office Box No. 2039, Victoria House, Chowringhee Square, Calcutta.
- *4. British Mill Stores Co., Sir Vithaldas Chambers, Bruce Street, Fort, Bombay.
- *5. B. N. Mody and Co., 14/24, Civil Lines, Post Box 24, Cawnpore.
6. Chhoteylal Sanwal Dass, Bazar Sirkiwalan, Delhi.
- *7. Dadiha Ardeshir and Co., 13-A, Bruce Street, Fort, Bombay.
8. Excelsior Mill Supply Co., 45-46 Ali Chambers, Medows St. Fort, Bombay.
- †9. Edgar Handley and Co., Seksaria Chambers, 139 Medows St., Fort, Bombay.
- *10. Furdonjee Dinsha and Co. (Now Textile Traders), 41, Bruce Street, Bombay.
11. Guest Keen Williams Limited, Bhandup, Bombay.
12. Greaves Cotton & Co., Ltd., 1, Forbes Street (P. O. Box No. 91), Bombay.
13. Gannon Dunkerley and Co., Ltd., Chartered Bank Building, Esplanade Road, Bombay.
- †14. Imperial Trading Co., Ali Chambers, Tamarind Lane, Fort, Bombay.
- †15. Indo British Trading Bureau, 7/10 Elphinstone Circle, Fort, Bombay.
16. Industrial & Agricultural Engineering Co., 43, Forbes St., Bombay.
17. Jones Textilatics Export Co. Ltd., Jeroo Building, 137, Mahatma Gandhi Road, Bombay.
18. J. Bracewell Limited, 673, Haribhai Market Cross Lane, Railwaypura, Ahmedabad.
19. Mohammad Rafiq Mohammad Hanif, Meston Road, Cawnpore.
- *20. Mehta Parekh and Co., 45-47 Apollo St., Fort, Bombay.
21. Mill Stores Trading Co., India Ltd., Mehta House, 79-91 Apollo St., Fort, Bombay.
- †22. Mayashankar Thacker and Co., 65, Apollo St., Fort, Bombay.
23. H. M. Mehta and Company, Mehta House, 91 Apollo St., Fort, Bombay.
24. Nagindas Kilabhai and Co., Lalgir Chambers, Fort, Bombay.
25. Ormerods (India) Ltd., Bank of Baroda Building, Apollo Street, Fort, Bombay.
26. P. Kothare and Sons, 2nd Kumbharwada, Bombay.
27. P. R. Wallace and Sons Ltd., Elphinstone Building, 10 Churchgate St., Bombay.
28. Star Trading Co., Apollo St., Fort, Bombay.

- *29. Swastik Textile Trading Co., Ltd., Motilal Hirabhai Market, Railway-pura Post, Ahmedabad 2.
- 30. Sethna Katrak and Co., 30, Tamarind Lane, Fort, Bombay.
- 31. Shantilal Sheth and Co., Raja Bahadur Bansilal Motilal Mansion, 13-A, Bruce St., Fort, Bombay.
- 32. Textile Mfrs., Association, Pul Bangash, Delhi.
- *33. Textile Machinery and Accessories Industrial Export Group, Manchester.
- *34. Volkart Brothers, Graham Road, Ballard Estate, P. O. Box No. 199, Bombay.
- 35. W. H. Brady and Co., Ltd., Royal Insurance Building, Churchgate St., Bombay.

CONSUMERS :

- 1. Abdus Samad Abdul Huq, Butcher Mahal, Allahabad.
- 2. Ahmedabad Mfg. & Calico Printing Co. Ltd., C/o M/s. Karamchand Premchand & Co., Outside Jamalpur Gate, Ahmedabad.
- *3. Ahmedabad Mill Owners' Association, Lal Darwaja, P. O. Box 7, Ahmedabad.
- *4. Buckingham & Carnatic Co. Ltd., P. Box No. 66, Madras.
- 5. Bombay Dyeing and Mfg. Co. Ltd., Neville House, Ballard Estate, Bombay.
- *6. Calico Mills Limited, Ahmedabad.
- 7. Chotelal Sanwaldass, Bazar Sirkiwala, Delhi.
- *8. Delhi Cloth and General Mills Co. Ltd., Delhi.
- *9. Elphinstone Spinning & Wvg. Co. Ltd., United India Bldg., Sir P. M. Road, Bombay.
- *10. Finlay Mills Limited, Govt. Gate Road, Parel, Bombay.
- 11. India United Mills Ltd., Dougall Road, Ballard Estate, Bombay.
- *12. Indian Mfg. Co. Ltd., Sir Vithaldas Chambers, Apollo St., Fort, Bombay.
- *13. J. K. Cotton Spg. & Wvg. Mills Co. Ltd., Katala Tower, Cawnpore.
- *14. Khatun Makanji Spg. & Wvg. Co. Ltd., Laxmi Building, Ballard Estate, Bombay.
- 15. Kohinoor Mills Co. Ltd., C/o M/s. Killick-Nixon and Co., Home St., Fort, Bombay.
- *16. Khandeish Spg. & Wvg. Co. Ltd., Cambala Building, 42, Queens Road, Fort, Bombay.
- 17. Lyallpur Cotton Mills Limited, Lyallpur, W. Punjab.
- *18. Lakshmirathan Cotton Mills Co. Ltd., Behari Niwas, Cawnpore.
- 19. Mohd. Rafiq Mohd. Hanif, Meston Road, Cawnpore.
- 20. Monarji Gokuldas Spg. & Wvg. Co. Ltd., Supari Baug Road, Parel, Bombay.
- *21. Millowners Association, Churchgate Street, Bombay.
- 22. New Victoria Mills Co. Ltd., Cawnpore.
- *23. Savadi Thangavelu Mudaliar, Ekambara Kuppam, P. O. Nagari, Dist. Chittoor.
- *24. Shree Niwas Cotton Mills Ltd., Delisle Road, Post Box No. 13, Bombay.
- 25. S. M. A. Somasundara Mudaliar, Ekambara Kuppam, P. O. Nagari, Dist., Chittoor.
- 26. Gopaldass Jagat Ram, Talab Bazar, Ludhiana.
- 27. Didwania Bros., Ltd., Kashmir Gate, Delhi.

SUPPLIERS OF RAW MATERIALS :

- *Indian Steel & Wire Products Ltd., Indranagar P.O., Tatanagar.

APPENDIX II.

(Vide Para 3).

*List of persons who were invited for giving evidence at the public enquiry.***PRODUCER :****C. J. Textile Accessories Works, Nehru Rd., VILE PARLE, BOMBAY 24.****IMPORTERS :**

1. Abdus Samad Abdul Huq, Butcher Mahal, Allahabad.
2. Associated Textile Engineers, 43, Forbes Street, Fort, Bombay.
3. Burma Oil Co. (India Trading) Ltd., Post Office Box No. 2039, Victoria House, Chowranghee Square, Calcutta.
4. British Mill Stores Co., Sir Vithaldas Chambers, Bruce Street, Fort, Bombay.
5. B. N. Mody & Company, Civil Lines, Cawnpore.
6. Chhoteylal Sawal Dass, Bazar Sirkiwalan, Delhi.
7. Dadiba Ardeshir & Company, 13-A, Bruce Street, Fort, Bombay.
8. Excelsior Mill Supply Co., 45-46 Ali Chambers, Meadows Street, Fort, Bombay.
9. Furdonjee Dinsha & Co. (Now Textile Traders), 41 Bruce Street, Bombay.
10. Guest Keen Williams Limited, Bhandup Works, Bombay.
11. Gannon Dunkerley & Co. Ltd., Chartered Bank Building, Esplanade Road, Bombay.
12. Industrial and Agricultural Engineering Company, 43 Forbes Street, Bombay.
13. Jones Textilaties Export Company Limited, Jeroo Building, 137, Mahatma Gandhi Road, Bombay.
14. J. Bracewell, 673 Haribhai Market Cross Lane, Railwaypura, Ahmedabad.
15. Mohammad Rafiq Mohammad Hanif, Meston Road, Cawnpore.
16. Mehta Parekh & Company, 45-47, Apollo Street, Fort, Bombay.
17. Mill Stores Trading Co. (India) Ltd., Mehta House, 79-91, Apollo Street, Fort, Bombay.
18. H. M. Mehta & Company, Mehta House, 91 Apollo St., Fort, Bombay.
19. Ormerods (India) Ltd., Bank of Baroda Building, Apollo Street, Fort, Bombay.
20. P. Kothare & Sons, 2nd Kumbharwara, Bombay.
21. S. Star Trading Co., 16 Apollo Street, Fort, Bombay.
22. Swastik Textile Trading Co. Ltd., Motilal Hirabhai Market, Railwaypura Post, Ahmedabad 2.
23. Sethna Katrak & Co., 30 Tamarind Lane, Fort, Bombay.
24. Shantilal Sheth & Co., Raja Bahadur Bansilal Motilal Mansion, 13-A, Bruce Street, Fort, Bombay.
25. Textile Manufacturers Association, Pul Bangash, Delhi.
26. Volkart Brothers, Graham Road, Ballard Estate, P. O. Box No. 199, Bombay.
27. W. H. Brady & Co. Ltd., Royal Insurance Bldg., Churchgate Street, Bombay.

CONSUMERS

1. Ahmedabad Mfg. & Calico Printing Co. Ltd., C/o. M/s. Karamchand Premchand & Co., Outside Jamalpur Gate, Ahmedabad.
2. Ahmedabad Mill Owners' Association, Laldarwaja, P. O. Box 7, Ahmedabad.
3. Buckingham & Carnatic Co. Ltd., P. Box No. 66, Madras.
4. Bombay Dyeing & Mfg. Co. Ltd., Neville House, Ballard Estate, Bombay.
5. Calico Mills Limited, Ahmedabad.
6. Chhoteylal Sanwaldass, Bazar Sirkiwalan, Delhi.
7. Delhi Cloth & General Mills Co. Limited, Delhi.
8. Elphinstone Spg., Wvg. & Mfg. Co. Ltd., United India Building, Sir Pherozshah Mehta Road, Bombay.
9. Finlay Mills Limited, Govt. Gate Road, Parel, Bombay.
10. India United Mills Ltd., Dougall Road, Ballard Estate, Bombay.
11. Indian Manufacturing Co. Ltd., Sir Vithaldas Chambers, Apollo Street, Fort, Bombay.
12. J. K. Cotton Spg. & Wvg. Mills Co. Ltd., Kamla Tower, Cawnpore.
13. Khatau Makanji Spg. & Wvg. Co. Ltd., Laxmi Building, Ballard Estate, Bombay.
14. Kohinoor Mills Co., Ltd., C/o. M/s. Killick Nixon & Company, Horse Street, Fort, Bombay.
15. Khandeish Spg. & Wvg. Co., Ltd., Cambala Building, 42 Queen's Road, Fort, Bombay.
16. Lakshmiratan Cotton Mills Co. Ltd., Cawnpore.
17. Morarji Gokuldas Spg. & Wvg. Co. Ltd., Supari Bang Road, Parel, Bombay.
18. Millowners' Association, Patel House, Churehgate St., Bombay.
19. New Victoria Mills Co. Ltd., Cawnpore.
20. Savadi Thangavelu Mudaliar, Ekambara Kuppam, P. O. Nagari, District Chittoor.
21. Shree Niwas Cotton Mills Limited, Bombay.
22. S. M. A. Somasundara Mudaliar, Ekambara Kuppam, P. O. Nagari, District Chittoor.
23. Gopaldas Jagat Ram, Talab Bazar, Ludhiana.
24. Didwania Brothers Limited, Kashmiri Gate, Delhi.

SUPPLIERS OF RAW MATERIALS :

Indian Steel & Wire Products, Limited, Tatanagar, Bihar.

APPENDIX
(Vide Para X)

List of person who attended the enquiry

PRODUCERS :

1. C. J. Textile Accesories Works, Bombay- Represented by
 1. Mr. V. G. Jani,
 2. Mr. C. J. Jani,
 3. Mr. M. L. Makaria,
2. Association of Merchant & Manufactures of Textile Stores and Accesories, Bombay---represented by
 1. Mr. S. H. Bhagwati
 2. Mr. R. S. Desai

IMPORTERS :

1. British Mills Stores, Bombay---represented by
Mr. B. H. Gotla.
2. Textile Traders, Bombay---represented by
Mr. M. F. Sethna.
3. Jones Textilaties Export Company Ltd , Bombay---represented by
Mr. H. E. Stott.
4. Ormerods (India) Limited, Bombay - represented by
Mr. A. Barucha.

CONSUMERS :

1. Sri Niwas Cotton Mills Limited, Bombay---represented by
Mr. S. R. Sabnis.
2. Millowners' Association Bombay---represented by
Mr. N. S. V. Aiyar
3. Engineering Association of India, Culcutta -represented by
Mr. DeMello.
4. M/s. Savadi Thangavelu Mudaliar, coittoor (Madras)---represented by
Mr. V. M. Krishniah.
5. India United Mills Limited, Bombay represented by
Mr. A. Howrah

OFFICIALS :

1. Textile Commition Bombay--- represented
Mr. Cooper.
2. D.G.I. & S.---represented by
Mr. Jangbir singh